Internet Assisted Review Focus Group

Date:	March 12, 2003, Thursday
Time:	9:30–11:00 a.m.
Location:	Rockledge 1, Room 3502
Advocate:	Eileen Bradley
Analysts:	Tracy Soto, Daniel Fox
Next Meeting:	TBD

Action Items

1. (Tracy Soto, Daniel Fox) Investigate the addition of a SEP service field to the Verify NIH Support for (name of person) screen.

2. (Tracy Soto, Daniel Fox) Add the panel name to the Maintain Profiles Detail View screen.

3. (Tracy Soto) Post the Reviewer Create Account Process on the Web site.

4. (Tracy Soto) Contact Patty Austin regarding turning the Reviewer Create Account Process into an on-line tutorial.

5. (Tracy Soto) Set up the next meeting and send a notification to the group.

6. (All) Send email to Tracy Soto and Daniel Fox regarding your thoughts on file size limits for the Meeting Materials and list of type of document (file types) and descriptions.

Attachments

- New List of Meetings: http://era.nih.gov/Docs/list_of_meetings_for_SRA_Screen_Shot.pdf

- Placement of and language for Score reminder text: http://era.nih.gov/Docs/Placement_of_and_language_for_Score_reminder_text.pdf

- Reviewer Create Account Process: http://era.nih.gov/Docs/reviewer_create_account_new_screens.pdf

- Proposed Reviewer emails for reviewers with accounts in Pending Rvwr or Pending NIH statuses: http://era.nih.gov/Docs/Commons_email_messages_2_new_reviewer_emails.pdf

Helpdesk

Tracy Soto reported that three people will be added to the Helpdesk staff and the hours will be extended on April 1. The new weekday hours will be 7 a.m.–8 p.m. Helpdesk hours also will extend to six hours on Saturday, covered by two people—four hours each and a two-hour overlap.

Once this is in place, Tim Twomey will investigate the need for Helpdesk coverage on Sundays and on certain holidays that are not generally observed outside the government, e.g., Presidents Day, Veterans Day.

Data Quality

Tracy said that Tim Twomey has dedicated one government staff on-site to triage account requests. The government on-site person will do simple requests and QRC (the contractor) will do the more complicated requests. For the first few days implemented, this has resulted in the 370 account requests that were backlogged to be reduced to 97.

Screens

Tracy reviewed the changes to IAR.

Screen	Comments
List of Meetings	The following changes were made for the List of Meetings functionality: • Added search ability for meetings within your cluster. Default list will be where you are on the roster. Solves problem of multiple SRAs, GTAs, RTAs and others who need to help out with a meeting but do not need to be on the roster. • Added number of applications to the screen. • Bolded the meeting identifier. • Added the ability to sort for all columns (using hyperlinked column headings).
Submit Critique and Preliminary Score	Tracy noted that if a reviewer browses and selects a critique to upload but, for some reason, clicks "Cancel," the path and filename of the critique are lost and the reviewer will have to browse, find and select the file again. It is not necessary to enter the score when the critique is uploaded; they can be entered separately. Tracy noted that, right now, if the critique has been submitted and then the reviewer goes in later and enters the score, it looks like the critique disappears. In fact, it is rebuilding the critique to include the new score. This disappearance of the critique during score rebuilding is on the maintenance list to be fixed. The fix will be to show the Word document when the PDF is being built. **Suggestion**: Put a reminder on the confirmation screen to alert the Reviewer to the fact that if they didn't submit a score, they can go back to List of Applications and submit just the score (not critique).

Reviewer Create Account Process

Tracy showed the screens that accompany the following steps that a reviewer must take to create a Commons account:

- SRA enables Reviewer (this triggers email to be sent to those reviewers who do not have a Commons account)

- Reviewer clicks on URL in email.

- Reviewer fills in form and clicks Continue.

- Reviewer verifies data on NIH Support page. There is an optional screen, Add NIH Support, that the Reviewer can fill in at this time. It was pointed out that there is no place to enter Special Emphasis Panel (SEP) service.

Action: **(Tracy Soto, Daniel Fox) Investigate the addition of showing SEP service on the Verify NIH Support for (name of person) screen.**

Note: The group agreed that on the Add NIH Support page, the terms for grant number components like Type and Activity are not clear enough and that a hint or sample line or descriptions should be added.

- Reviewer clicks either "Correct" or "Incorrect;" then clicks Continue Account Request.

- Reviewer verifies data; then clicks Continue Account Request.

Note: Change "two business days" to a longer period on the Complete Account Request screen.

- Reviewer sees final Welcome to the Commons screen.

Maintain Profiles Summary View—This is the screen that data quality staff uses for Commons account approvals.

Maintain Profiles Detail View—Add the panel name to this screen.

Action: **(Tracy Soto, Daniel Fox) Add the panel name to the Maintain Profiles Detail View screen.**

Passwords—If the Signing Official (SO) at an institution signed up their Principal Investigators (PIs), the SO may not have communicated the username and password they used to sign them up to the PI. SRAs can instruct their reviewers to either contact their SO for assistance or use the Commons Forgot Password utility located directly under the login box on the Commons home page. Reviewers only need to know their username and email address, which the SRA or GTA can supply for them (it is available in the Control Center).

It also was suggested the Commons username be displayed in the Person Module (Person Admin, Edit Profile) next to Com Link to Profile (PERM, PROV) so SRAs and GTAs can see the Username in Peer Review instead of always having to go to IAR Control Center.

Action: **(Tracy Soto) Notify the analyst for Person Module about displaying the username in the Person Module.**

Pending Accounts—If a Reviewer's account status is pending, and they are enabled, the email they receive is misleading. The email currently sent by IAR will assume that since Reviewer has

a Commons username that they must have an active account. This is incorrect—Review could have a pending reviewer or pending NIH status.

Reject Account Request—Should the Reviewer review the data and find a few things missing, the data should still be approved and the Reviewer should continue with the process. If the Reviewer hits "Reject Account Request" because something is missing, the system ends the process and disables the Reviewer from the meeting.

Action: **(Tracy Soto) Post the Reviewer Create Account Process on the Web site.**

Action: **(Tracy Soto) Contact Patty Austin regarding turning the Reviewer Create Account Process into an on-line tutorial.**

IAR Requirements

The group addressed IAR requirements, numbers 21–41 at the meeting. This table shows the changes and priorities the group agreed upon.

#	Requirement	Comments/Priority
21	Add meeting wide option to toggle the ability to submit non-numeric scores. Default is Allow.	Add to Maintenance task.
22	Modify the boilerplate on the Critique/Score confirmation screen to remind reviewers about score entry and provide instructions on how they can enter score later.	Add to Maintenance task.
23	The system should provide virus protection from any viruses that may exist in critique files. (10/16/02 This is dependent on Framework and may or may not be completed for version 1, phase 1.)	Short-term solution in place.
24	~~Reviewers get a lot of different emails from NIH and it is likely that an email with a soft indistinct subject line, such as invitation is getting ignored.~~	Delete.
25	Unlike Regular Reviewers who have not submitted their critiques in SUBMIT phase and are blocked, Discussants cannot upload their critiques. This is due to the rule that allows Discussant to view other critiques in READ phase even if they did not submit their own.	Medium/high.
26	~~The List of Applications screen should provide SRA/GTAs with the ability to toggle the ability to show/hide Discussants, Mail Reviewers and Readers.~~	Delete.
27	Request for chairman of the meeting/committee to have additional privileges in IAR. What privileges are needed?	Low. Want chair to be able to read all critiques and to be sent

#	Requirement	Comments/Priority
		the entire assignment list.
		It was noted that the chair, if enabled as a reviewer, can read all critiques in Read phase.
28	SUMMARY STATEMENTS OF MULTI-PROJECT APPLICATIONS: Need capability to create preliminary SS of subprojects. This also may be a requirement for Peer Review application.	Medium high.
29	Creating Pre-SS for multiproject applications There does not need to be a separate SS for a subproject, but the problem is that IAR doesn't create a preliminary summary statement for the parent grant unless the parent grant has critiques. We usually do not have a critique for the parent project since the overall opinion on the application cannot be written until all of the subprojects are discussed at the meeting. There are always a number of different expertise areas that need to be heard from for a program project. The final "resume" or opinion is then written from the notes of the discussion at the meeting and the SRA is the one that does that.	Medium high. This is a bug and is on the maintenance list to fix.
30	SRA **or Reviewer** needs ability to post multiple critiques **or scores** for a reviewer.	Medium. See additions in **boldface**.
31	1) There is a need to shut off the adjectival scoring (DF, UN/NC, etc.) as this interferes with lower half designations. 2) There is a delay in branching over names as they are added to the roster. When new names are added to the roster, sometimes the names appear in IAR within hours, other times it has taken as long as 3 days. This causes problems at the time of the mailout. 3) Apparently, the IAR pulls in information from Edison. This has been causing some problems. 4) Reviewers have been appearing twice in IAR, but only once on the roster. 5) Administrator at Institution/University has established an account for a reviewer, but hasn't informed the	1. Delete. 2. If not on Assign Reviewer screen, won't show up on roster. Will monitor to see if still happening. 3. Delete. 4. Delete. 5. Delete. 6. No comment. 7. Low. The analysts will look into this.

#	Requirement	Comments/Priority
	~~reviewer.~~ 6) Links to IMPAC are problematic. 7) I would like to the double appearance of the screen from Adobe asking if I want to open or save the critique, when I click on view, to go away. It should just open the critique, then the SRA/GTA can go to file/save if they want to save it elsewhere.	
32	~~Contract SRAs cannot get access to IAR (because their names are never on the roster). In order to work in IAR, they need to use someone else's user name and password.~~	Delete.
33	Telephone reviewers cannot be blocked from their unassigned applications. I understand the explanation for why we can't automatically block them. However, we could give them the option to opt out of access to all unassigned applications, if they're not interested in seeing them. This way, they wouldn't have to receive a very long COI list for applications which they have no interest in.	Delete. Can't treat telephone reviewers differently than other reviewers.
34	~~When making their account, many reviewers overlook that they have to click SUBMIT on 2 different pages. Thus, their account sits as "pending reviewer" and they do not know that it did not go through. They should either highlight this aspect further, or, if a reviewer only clicks SUBMIT once, they should get an "error" message when they try to leave asking if they think they are done or are they going to come back to this page.~~	Delete. Can't do this.
35	The IAR Control Center should allow SRA/GTA to toggle show/hide preliminary scores from all (meeting wide option) Reviewers in IAR. If Scores are hidden, Reviewer would only see scores they've entered. If scores are not visible (as designated by SRA/GTA in Control Center) Reviewer will not see score portion of score matrix—they will only see lower half.	Low. It will impact critique headers.
36	The system could include personalized, online, completely electronic, conflict of interest forms.	Low. Will be good when we go completely electronic without paper signatures and conflict of interest forms.

#	Requirement	Comments/Priority
37	When changes occur (i.e., any change in the assignment matrix, COI, application added, withdrawn, or deferred), Reviewers and Discussants associated with the affected application (EXCLUDING those in conflict and mail reviewers) should receive email notification of the changes. This requirement may be met by another upcoming eRA system—Notification. When an application is deferred (901 change)/moved to another meeting, if critiques were already submitted the SRA/GTA should have the option of whether to keep or delete the critiques. When changes in conflicts are added or deleted, the affected reviewer should receive email notification of the changes. This requirement may be met by another upcoming eRA system—Notification. This requirement needs more discussion because, "on the one hand, it is important that a reviewer be notified when a conflict has been removed, so (s)he will know of the need to be prepared for discussion of the application. On the other hand, if an SRA "enables" the meeting in IAR and THEN does a conflict check on all reviewers, there could be multiple messages about conflicts that were already known to the reviewer as well as both the addition and the "ignoring" of non-conflicts. Reviewers would NOT want that kind of bombardment."	Low. The e-notification system, under development, will address and fix this issue. When the new system is operational, the analysts will bring the issue back to the team to reconsider. One issue with this is that the SRA/GTA would need the ability to turn off this feature while meeting is being finalized.
38	Some SRA/GTAs read critiques as they are added to the ER Web site allowing them to be better prepared for meeting and to spot potential problems. A useful feature would be the ability to mark an application as read and approved by the SRA/GTA to help streamline the assembly of triaged summary statements in particular. If a critique is updated then the check mark will be removed automatically.	Low.
39	Allow users to choose certain applications to merge associated critiques into a PDF file.	Low.
40	~~It would be useful for SRA/GTAs to control the numeric score assigned to applications that the reviewers have designated as "UN" or "LH." ER assigns a score of 0 to unscored applications when computing averages. Thus, an application with the following scores: LH, LH, 2.0 is assigned an average of 2.0, whereas an application with scores of 2.1, 2.2, 2.0 is given an average of 2.1. This~~	Delete. See #21.

#	Requirement	Comments/Priority
	~~reduces the utility of using the score matrix to monitor spreading of scores and could lead to confusion on the part of reviewers. If SRA/GTAs are not given control over the handling of LHs, then it might be reasonable to assign a 4.0 to all LH nominations.~~	
41	~~UN/LH voting. Reviewers could have the ability to post streamlining votes. The Reviewers would pull up their assigned applications and have the ability to select applications for lower half.~~	Delete. See #30.

Next Meeting

Tracy will set up the next meeting and send a notification to the group. The focus of that meeting will be the rest of the requirements. Everyone is asked to bring the same requirements list with them and be prepared to discuss and rank the rest of them. A few copies with track changes enabled will be available at the next meeting for those who missed this meeting.

Action: **(Tracy Soto) Set up the next meeting and send a notification to the group.**

Attendees

David, Bobbie (CSR)
David, Tracey (CSR)
Dinterman, Kathy (CSR)
Fox, Daniel (NGIT)
Hannah, Judy (NHLBI)
Hindi-Alexander, Michele
    (AHRQ)

Moen, Laura (NIHMS)
Petrosian, Art (CSR)
Pham, Phuong (NCI)
Pike, Brian (NIGMS)
Richters, John (NINR)
Seppala, Sandy (LTS/PCOB)
Sheridan, Peter (NIMH)

Siegert, Mark (OD)
Sinnett, Ev (CSR)
Soto, Tracy (OD)
Tatham, Thomas (CSR)
Thee, Linda (CSR)
Wojcik, Brian (NCI)